# **DEFENSE HEALTH INFORMATION MANAGEMENT SYSTEM**



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# **Course Notes**



- Purpose of Course
- Target Audience
- Environment for Application Share
- Pre-positioned Data
- Acronyms

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## **Purpose of Course:**

The purpose of this training is to demonstrate menu options in the Composite Health Care System (CHCS) that allow Emergency Room (ER) personnel to check-in and check-out patients who are treated in the Emergency Room, view patient appointments history, print ER-related forms and reports, and maintain the ER clinic and provider profiles.

**Target Audience:** Emergency Room personnel (clerks and supervisors) who process patient encounters in the ER

**Environment for Application Share:** The CHCS Training Database (TDB) will be used for application share.

**Note:** All patients' names and personal data are fictional and not based on any real patients.

**Pre-positioned Data:** Complete the following <u>prior to class</u>:

- Lesson 2, Topic 3

Add Picard, Jessica as a new ER patient in the ER01 clinic. Chief complaint: Fell and injured left hip while walking

- Lesson 2, Topic 4

Add Scott, Allan as a new ER patient in the ER01 clinic.

Chief complaint: Hot water burn

Acronyms: Acronyms are listed on the following slide.

# **Acronyms**



**CHCS** Composite Health Care System

**DEERS** Defense Enrollment Eligibility Reporting System

**EOD** End-of-Day

**ER** Emergency Room

**JACHO** Joint Commission on the Accreditation of

Healthcare Organizations

**MEPRS** Medical Expense Performance and Reporting

System

MTF Military Treatment Facility

PAS Patient Appointment & Scheduling

**TDB** Training Database

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#### **Instructor Notes:**

The acronyms used in this course are listed here for your reference.



# Patient Appointment & Scheduling (PAS): Emergency Room Basics

Emergency Room (ER) personnel (Clerks and Supervisors) who process patient visits in the ER



#### **Instructor Notes:**

Be sure to complete a sound-check before beginning the class.

#### Text:

Welcome to the PAS: Emergency Room Basics course for ER clerks and supervisors.

This course is for military treatment facility (MTF) personnel who currently process ER patient visits.

To begin our session, let's review the agenda for the course.

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# **Instructor Notes:**

This Table of Contents is intended for the hard-copy reader and should be skipped for the presentation.

# **Agenda**



Agenda

**Course Objectives** 

Introduction

Lesson 1: File and Table

Lesson 2: Processing ER Visits

Lesson 3: Printing Forms and Reports

**Course Summary** 

References

Questions

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## **Instructor Notes:**

Point to each item as it is discussed.

## Text:

This course will cover the following [read agenda items].

# **Course Objectives**



Upon completion of this course, you will be able to:

- Maintain the ER-related file and table entries in CHCS
- Accurately document a patient's ER visits from check-in to check-out
- Print a Standard Form 558 (SF558), and selected reports that relate to patient encounters and ER workload

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#### Text:

[Read the objectives.]

Now, let's advance to the next slide for an introduction to the course content.

# Introduction



- Need for Training
- Target Audience

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## **Need for Training:**

Formal training will ensure that you have the knowledge, skill, and ability to accurately perform all tasks associated with processing ER visits.

If these tasks are performed incorrectly or not performed at all, the following consequences may result:

- Timely evaluation of the patient may be affected if the check-in process is delayed.
- When critical clinical information is not found in a patient's medical record, this may adversely affect a provider's decisions and cause detriment in patient care.
- Loss of workload and revenue may result if the patient encounter is not documented or updated properly.
- Patient encounters that are incomplete will not be part of the patient's electronic or hard copy record; therefore, the patient's medical history/record in CHCS may be incomplete.

## **Target Audience:**

This course is designed for ER personnel (clerks and supervisors) who process patient encounters in the ER.

# Introduction (cont.)



- Methodology
  - PowerPoint Slides
  - Software Demonstrations
  - Questions

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## Methodology:

This course is designed to be delivered by an instructor in a virtual classroom setting, which is where we are logged in today.

I will narrate the training session using PowerPoint slides; and, when possible, I will use application sharing through the CHCS training database to demonstrate functionality related to processing emergency room visits and printing the SF558 form and selected reports. The names and data in the training database are fictitious, of course, but will give you a good idea of how the software functions.

I welcome your participation in the classroom discussion, and I'll ask you to respond to quiz questions throughout the course.

Now, let's get started with Lesson 1.

# **Lesson 1: File and Table**



• Topic 1: ER Provider Profile

• Topic 2: ER Clinic Profile

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#### **Instructor Notes:**

Point to each topic as it is read.

## Text:

In Lesson 1, our discussion will focus on how to maintain the profiles that have been created for emergency room clinics and providers. The topics for this lesson are listed here. [Read the topics].

Now, let's go over the objective for Lesson 1.

# **Lesson 1 Objective**



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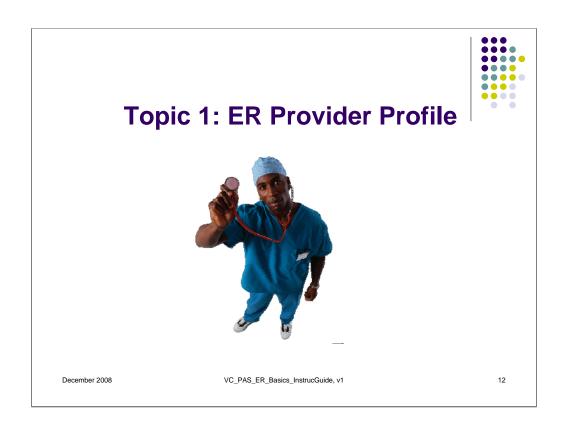
Maintain the ER-related file and table entries in CHCS.

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## Text:

This is the objective for Lesson 1. By the end of this lesson, you will be able to [read objective].

Now, let's move on to the first topic for this lesson.



In Topic 1, we will discuss how a new provider profile is added to an ER clinic. We'll also review and edit profile information for providers who are currently assigned to the selected ER clinic.

Let's look at the scenarios for this topic on the next slide.

# **Scenarios**



- 1. Recent changes make it necessary to update the Provider Profile file for this clinic. Add Dr. Jack as a new provider to the clinic.
- 2. You need to update the duty phone number for Dr. Calhoun.

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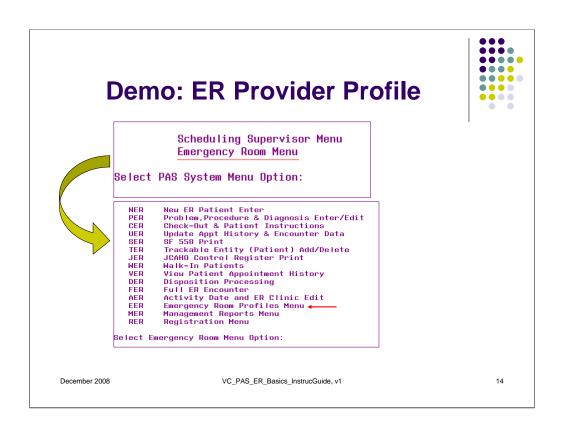
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## Text:

[Read the slide.]

Let's begin our demonstration.



#### **Instructor Notes:**

Log into the CHCS training database (FWVBB):

Access Code: PASERP Verify Code: PASERPV

Remember to press <Enter> after each entry you make in CHCS, as listed in the instructions in the text.

Talk as you enter the information so the audience knows what you are entering and why.

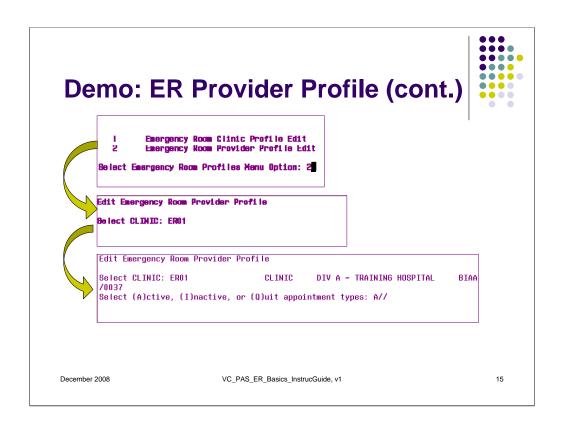
#### Text:

Your primary menu is the first menu you see when signing onto CHCS. Depending on the facility where you work, you may have a primary menu that differs from the one shown here.

At the 'Select PAS System Menu Option' prompt, type **E** and press the <Enter> key. After each entry, we will press the <Enter> key.

The Emergency Room Menu displays.

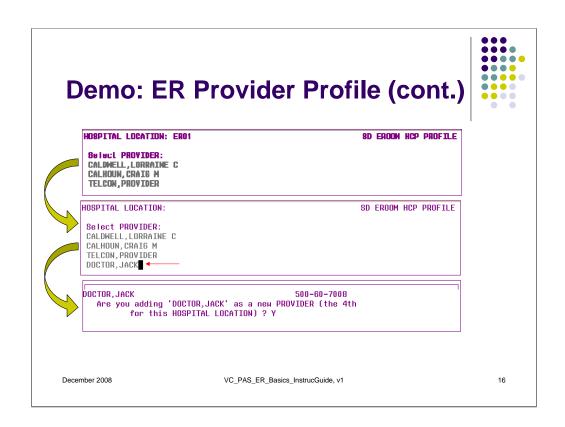
Type **EER** to display the Emergency Room Profiles Menu.



Type **2** at the 'Select Emergency Room Profiles Menu Option' prompt. The Edit Emergency Room Provider Profile screen displays.

Type **ER01** at the 'Select CLINIC' prompt. Confirm that the ER01 clinic is correct by pressing the **<Enter>** key.

Accept the default of 'A' (for Active) by pressing the **Enter**> key.

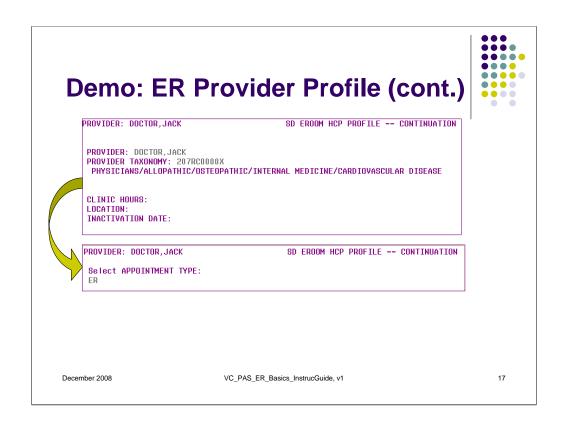


The SD EROOM HCP PROFILE screen displays with the list of current providers assigned to ER01.

You can add a provider to the clinic, if a record for the provider has been entered in the Provider file.

To add a new Provider Profile for this clinic, we will position the cursor below the last name on the list by pressing the **down arrow** key, and then type **DOCTOR,JACK**.

Press the **Enter**> key to confirm that you are adding Dr. Jack as a new provider.



The SD EROOM HCP PROFILE -- CONTINUATION screen displays.

This screen displays general information pertinent to the provider in the clinic (e.g., provider taxonomy, clinic hours, location and inactivation date).

Press the **<Enter>** key to display the provider's title and duty and home phone numbers. As always, follow your site procedures for entering information in these fields.

We will not make any changes on this screen. Press the **<Enter>** key until you are returned to the previous screen.

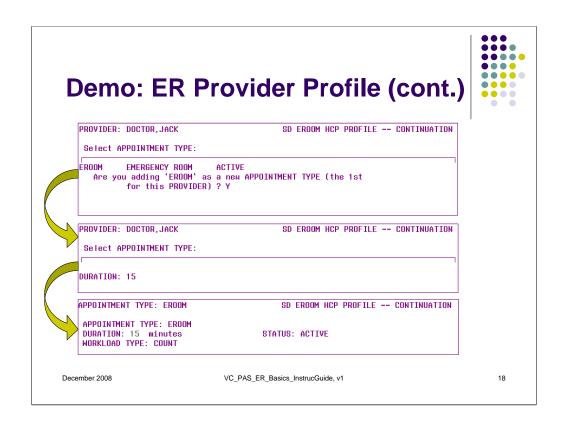
Entering information in the 'CLINIC HOURS' and 'LOCATION' fields is optional.

We will add the days and hours that this provider works. Press the **<Enter>** key to access the 'CLINIC HOURS' field and enter **Wednesday – Saturday 0400 – 1600**.

Press the < Enter> key until the 'Select APPOINTMENT TYPE' prompt is displayed.

If you are not sure what appointment types are available for selection, you can type a double question mark (??) at the prompt and press the <Enter> key.

We'll type ER.



Confirm that you are adding EROOM as a new appointment type by pressing the **<Enter>** key.

Type **15** at the 'DURATION' field.

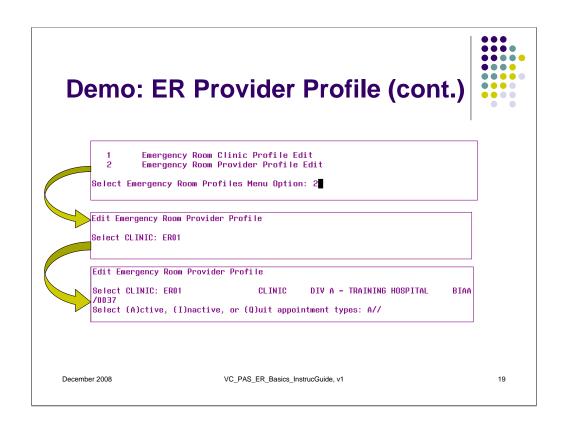
Press the **<Enter>** key through the remaining fields to accept the defaults. The appointment type of EROOM is now added as an appointment type.

Press the **Enter** key once more to return to the list of providers. Doctor Jack has now been added as another provider in the ER01 clinic.

Return to the SD EROOM HCP PROFILE screen by pressing the **<Enter>** key. Continue to press the **<Enter>** key to access the 'File/exit' action.

Press **Enter** again, to return to the Emergency Room Profiles Menu.

Next, we will discuss editing an existing Provider Profile.

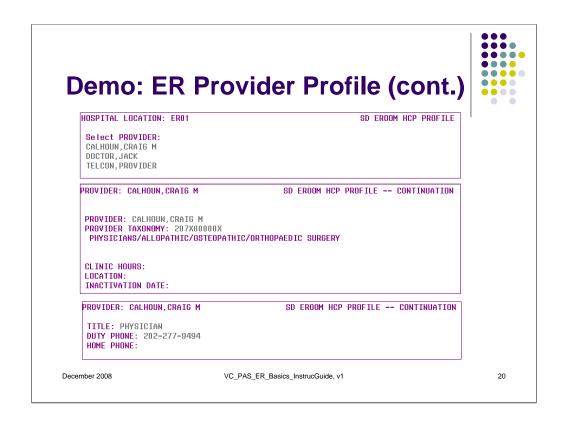


Our next scenario is that Dr. Calhoun's duty phone number changed and we need to update it in CHCS.

Type **2** at the 'Select Emergency Room Profiles Menu Option' prompt. The Edit Emergency Room Provider Profile screen displays.

Type **ER01** at the 'Select CLINIC' prompt.

Accept the default of 'A' (for Active) by pressing the < Enter> key.



The SD EROOM HCP PROFILE screen displays with the list of current providers assigned to the ER01 clinic.

Press the **<Up Arrow>** key to place your cursor on Dr. Calhoun's name and press the **<Enter>** key.

Press the **Enter** key until you reach the 'DUTY PHONE' field, and then enter the new telephone number. [**Note**: Enter any phone number you wish to use.]

Press the **Page Down** key until 'File/exit' is displayed, and then press the **Enter** key to exit and save the changes.

Press the **Enter** key again to return to the Emergency Room Profiles Menu.

Now, I have a question for you?

# **Question**



True or False:

The 'CLINIC HOURS' and 'LOCATION' fields are required fields when adding an ER provider to the ER Provider profiles.



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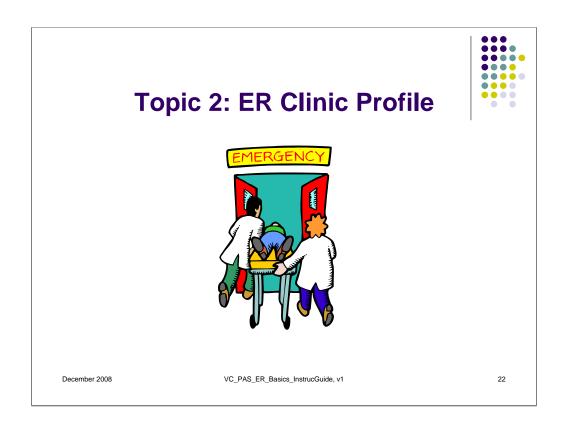
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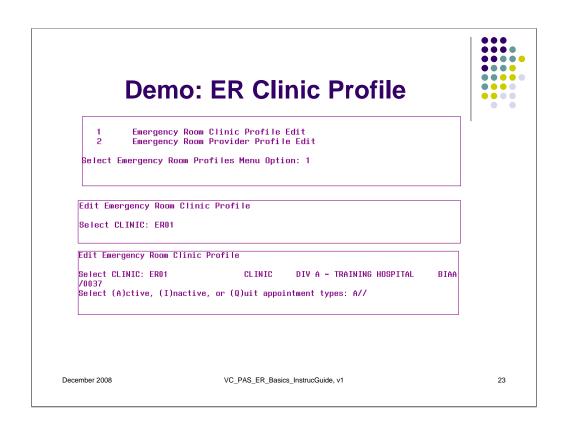
#### Text:

The answer is **False**. Topic discussed on slide 17. The 'CLINIC HOURS' and 'LOCATION' fields are not required when adding a provider to the ER Provider profiles. Data in these fields are for information only.

Let's move on to Topic 2.



In Topic 2, we will discuss how to edit an existing ER Clinic Profile. Let's begin the demonstration.

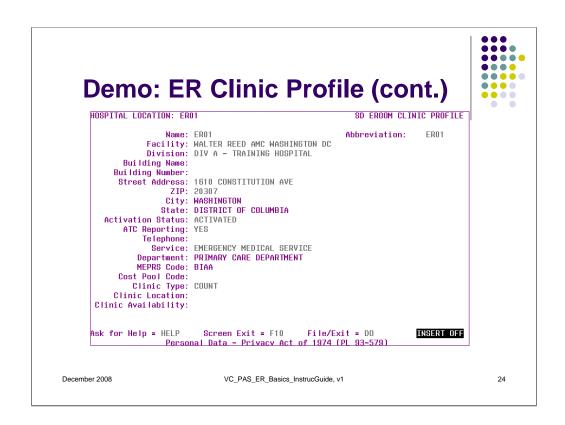


Type **1**, to access the Emergency Room Clinic Profile Edit option. You are prompted to enter the name of the clinic.

Type **ER01** at the 'Select CLINIC' prompt.

Press the < Enter> key to accept the default of 'A' (for Active) appointment types.

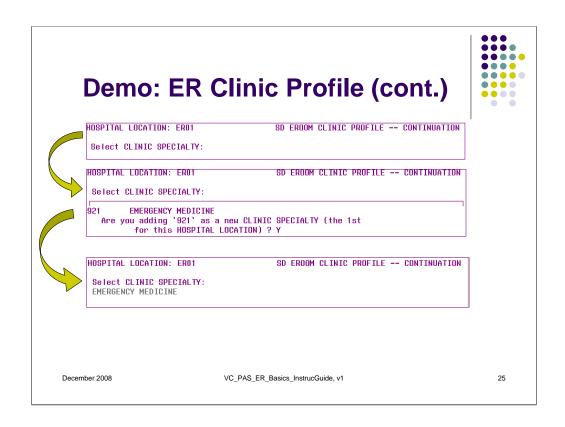
The SD EROOM CLINIC PROFILE screen displays.



This is the first of four SD EROOM CLINIC PROFILE screens. The majority of the information for the Clinic Profile will have been entered by the System Specialist when the file and table entries were initially created on your CHCS platform. However, you can enter the 'Building Name,' 'Building Number', etc.

Let's press the <Enter> key to access the 'Telephone' field and enter 555-5555.

Let's continue to press the **Enter**> key through these fields until the next page displays.



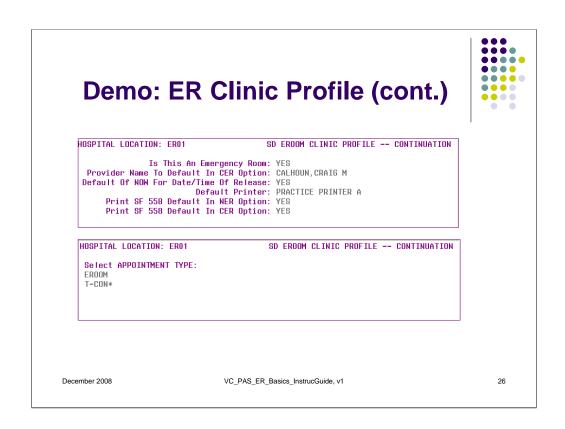
The second screen for the Emergency Room Clinic Profile displays.

Type Emer at the 'Select CLINIC SPECIALITY' prompt.

You are prompted to add Emergency Medicine as the Clinic Specialty. Press **Enter>** to confirm your response.

Emergency Medicine now displays as the clinic specialty for the ER01 hospital location.

Press the **<Enter>** key to advance to the next screen.



Here you see that this hospital location is defined as an Emergency Room. [Instructor Note: Press the <Enter> key to the next field: 'Provider Name To Default In CER Option.'

This field identifies the provider who will be defaulted when patients are checked out of the emergency room clinic. The ER01 location currently has Dr. Calhoun as the default provider. This is a default value only, so you can edit this data, if needed.

Today we do not want to have a default provider, so let's remove Dr. Calhoun's name. Press the **Spacebar**> key several times, and then press the **Enter**> key. The field is now blank.

Let's continue to press the **Enter**> key until the appointment types are displayed.

We will not make any changes to the appointment types. Press the **Page Down** key and the **Enter** key three times to access the 'File/exit' action, and then return to the ER Menu.

Now, let's test your knowledge with another question.

# Question



The default provider's name will display when:

- A. A patient is entered as a new ER patient
- B. A trackable entity is added
- C. A patient is checked out of the ER



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## Text:

The correct answer is **C**. The default provider's name will display when a patient is checked out of the ER.

Topic discussed on slide 26.

Now, let's move on to Lesson 2.





- Topic 1: New ER Patient Enter (NER) Option
- Topic 2: Update Appointment History & Encounter Data (UER) Option
- Topic 3: Trackable Entity (Patient) Add/Delete (TER)
   Option
- Topic 4: Check-Out & Patient Instructions (CER) Option
- Topic 5: View Patient Appointment History (VER) Option
- Topic 6: Activity Date and ER Clinic Edit (AER) Option

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#### **Instructor Notes:**

The topics for this lesson are continued on the following slide.

#### Text:

In Lesson 2, we will discuss the various components involved in processing ER visits. The topics will be based on options from the Emergency Room Menu.

Topics 1 - 6 for this lesson are listed here. [Read the topics].

Let's go over the remaining topics on the next slide.

# Lesson 2: Processing ER Visits (cont.)



- Topic 7: Full ER Encounter (FER) Option
- Topic 8: Disposition Processing (DER) Option
- Topic 9: Walk-In Patients (WER) Option

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## Text:

These are the additional topics for Lesson 2. [Read the topics]. Next, let's go over the objective for Lesson 2.

# **Lesson 2 Objective**



Accurately document a patient's ER visit from check-in to check-out.

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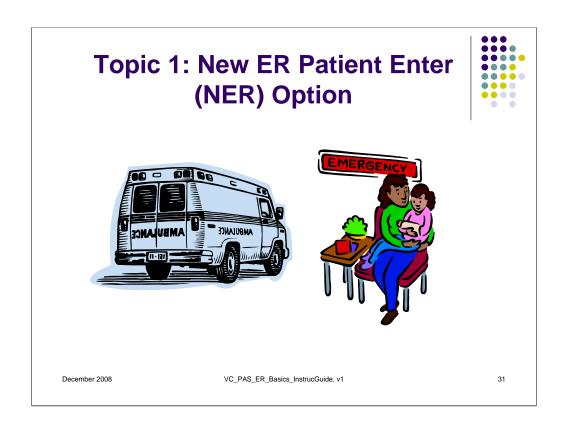
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## Text:

This is the objective for Lesson 2. By the end of this lesson, you will be able to [read objective].

Now, let's move on to Topic 1.



#### **Instructor Notes:**

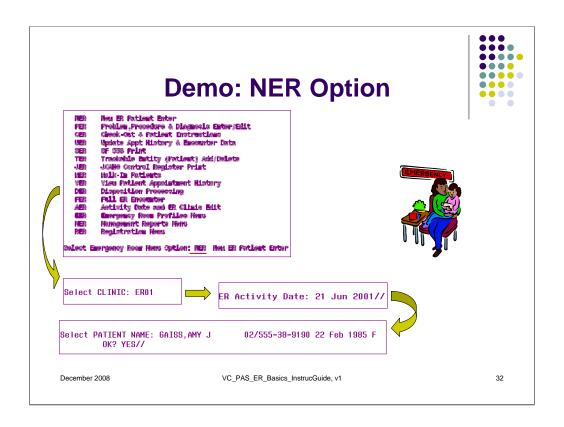
Remember to press the <Enter> key after each entry you make in CHCS, as listed in the instructions in the text.

#### Text:

In Topic 1, we will discuss steps used to check a patient into the emergency room. All patients must be registered in CHCS.

**Note:** It is recommended that you enroll in the PAD: Patient Registration course to learn how to register patients.

**Scenario:** Rachel Gaiss comes to the ER with her daughter, Amy, who fell off the unparallel bars during gymnastics. You will use the New ER Patient Enter (NER) option to check-in Amy Gaiss for this ER encounter.



Type **NER** at the 'Select Emergency Room Menu Option' prompt.

Type **ER01** at the 'Select CLINIC' prompt.

Press the **Enter** key to accept the 'ER Activity Date' of June 21.

Type **GAISS,AMY** at the 'Select PATIENT NAME' prompt and press the **<Enter>** key again to confirm that this is the correct patient.

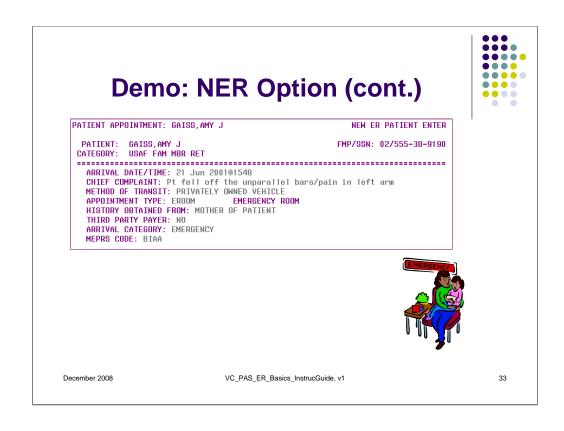
The NEW DEERS (Defense Eligibility Enrollment Reporting System) INTERACTIVE REQUEST – WAIT screen displays.

The training database is not connected to DEERS; therefore, we will type  ${\bf X}$  to exit the screen.

Type **X** again to exit the NEW DEERS INTERACTIVE REQUEST- TIMEOUT screen.

The demographics screen displays. You may update the patient information at this time by accessing either the Full or Mini Registration option.

We'll press the **<Enter>** key to accept the default of "C", to continue.



#### **Instructor Notes:**

The New ER PATIENT ENTER screen continues on the next screen.

#### Text:

The NEW ER PATIENT ENTER screen displays.

Enter the information for each field as follows:

ARRIVAL DATE/TIME: 21 Jun 2001@1428 < Enter>

CHIEF COMPLAINT: Pt fell off the unparallel bars/pain in left arm

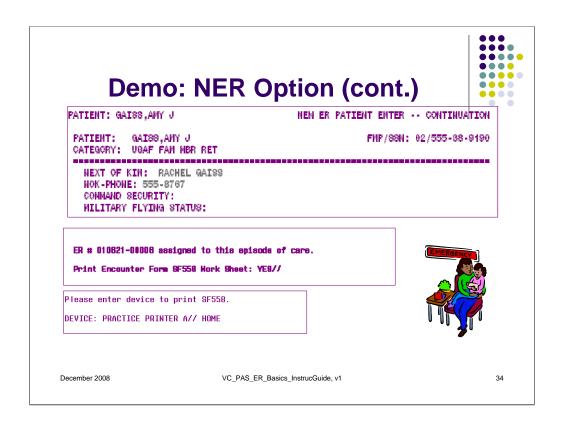
METHOD OF TRANSIT: POV (Privately Owned Vehicle)

APPOINTMENT TYPE: EROOM < Enter>

HISTORY OBTAINED FROM: **MOP** (Mother of Patient)

THIRD PARTY PAYER: NO **<Enter>** ARRIVAL CATEGORY: **EMERGENCY** 

MEPRS CODE: BIAA < Enter>



Type **RACHEL GAISS** in the 'NEXT OF KIN' (NOK) field.

At the 'NOK-PHONE' field, enter the patient's telephone number.

Note: The phone number is your choice.

Continue to press the **<Enter>** key until the record is filed.

Once you have entered the patient's name in CHCS, you will be prompted to print the SF558.

Press **<Enter>** to accept the default.

To print the SF558 to the screen, type **HOME** at the 'DEVICE' prompt.

Scroll up to display the SF558.

Let's test your knowledge with another question.

# **Question**



True/False

A patient DOES NOT have to be registered in CHCS prior to check-in.

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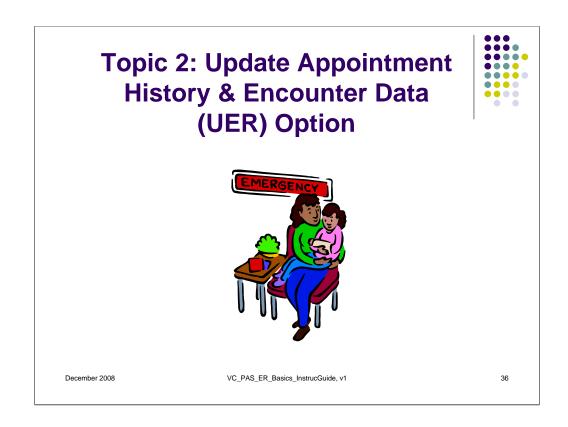
#### Text:

The answer is False. All patients must be registered in CHCS prior to check-in.

Topic discussed on slide 31.

If you do not know how to register a patient, please enroll in the PAD: Registration course that is offered through the virtual classroom.

Let's move on to Topic 2.

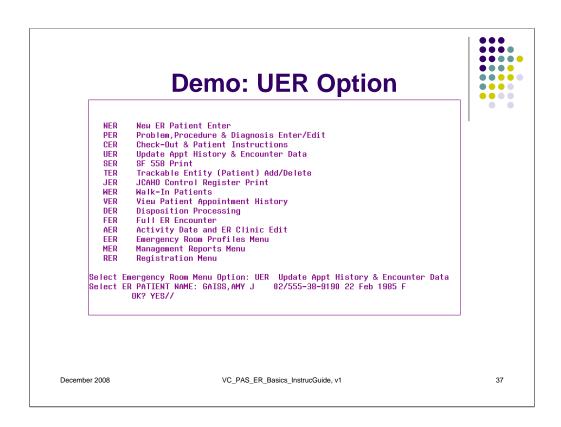


In Topic 2, we will discuss how to update an emergency room patient encounter, which was entered through the New ER Patient Enter (NER) option.

Once the new patient's data have been entered into CHCS using the NER option, there are several ways you can update or edit the information:

- Enter/edit a problem, procedure, and diagnosis, using the Problem, Procedure, & Diagnosis Enter/Edit (PER) option
- Update appointment history and encounter data, using the Update Appt History & Encounter Data (UER) option
- Check-out the patient, providing him/her with instructions using the CER option

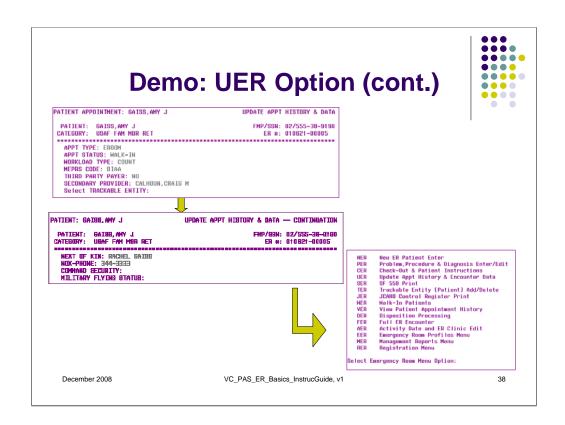
We will use the UER option to update a patient's encounter data. Let's begin the demonstration.



Type **UER** at the 'Select Emergency Room Menu Option' prompt.

Type GAISS,A at the 'Select ER PATIENT NAME' prompt.

Press the **Enter**> key again to confirm that this is the correct patient.

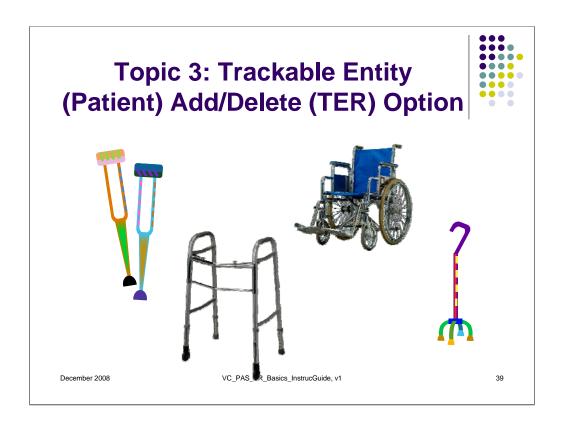


The UPDATE APPT HISTORY & DATA screen displays.

Dr. Calhoun, the Orthopedic Specialist, assisted the primary physician in the ER. Press the **<Enter>** key to access the 'SECONDARY PROVIDER' field, and then type **CALDWELL**.

Press the **<Enter>** key to accept the 'File/exit' action. Continue to press the **<Enter>** key until you are returned to the Emergency Room Menu.

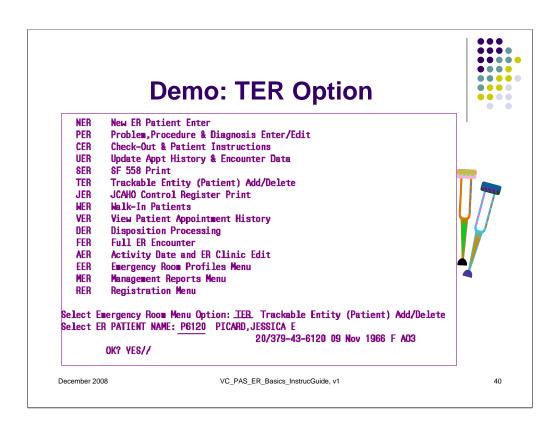
Let's move on to Topic 3.



In Topic 3, we will discuss the Trackable Entity (Patient) Add/Delete option, which allows you to add and delete trackable entities in a patient record. Trackable entities are items that the ER staff might issue to a patient such as crutches, canes, and wheelchairs. A report may be printed to track such items.

**Scenario:** Jessica Picard has come to the ER for pain in her left hip after falling. The ER will loan her a wheelchair to use. Add the wheelchair as a trackable entity to her ER encounter.

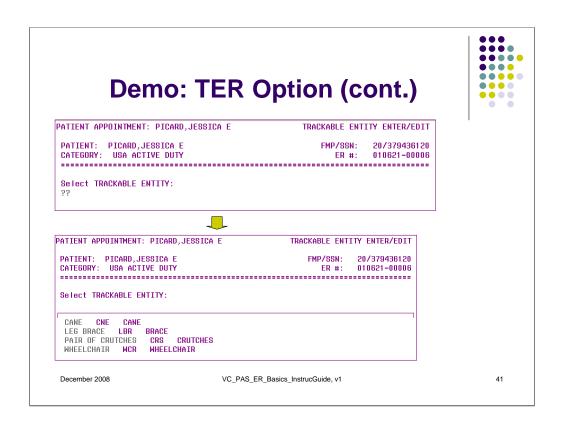
Let's begin our demonstration.



Type **TER** at the 'Select Emergency Room Menu Option' prompt.

Type P6120 at the 'Select ER PATIENT NAME' prompt.

Confirm that Jessica Picard is the correct patient by pressing the **<Enter>** key.

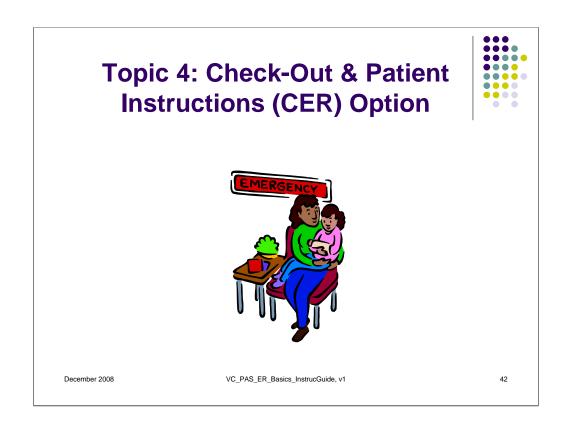


The TRACKABLE ENTITY ENTER/EDIT screen displays.

Type a double question mark '??' at the 'Select TRACKABLE ENTITY' field, and then press the **Enter**> key twice to display a list of trackable entities. Additional trackable entities may be added via the Trackable Entity Enter/Edit option on the File/Table Maintenance Menu.

Press the **<Down Arrow>** key until the cursor is blinking next to 'WHEELCHAIR' and press the **<End>** key, which is our select key.

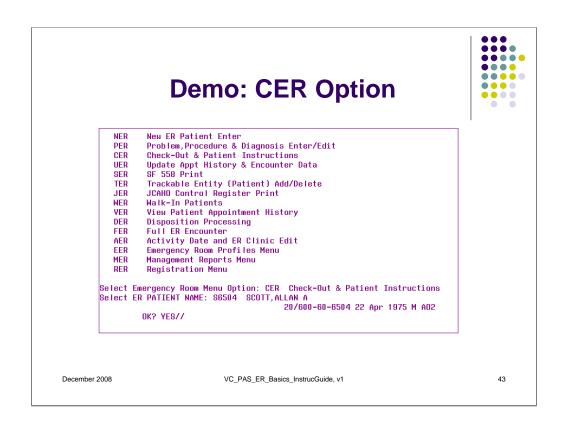
The system will populate 'WHEELCHAIR' under Select Trackable Entity. Press the **<Enter>** key twice to save the entry and return to the Emergency Room Menu. Now, let's move to Topic 4.



In Topic 4, we will discuss how to check patients out the ER and process their instructions.

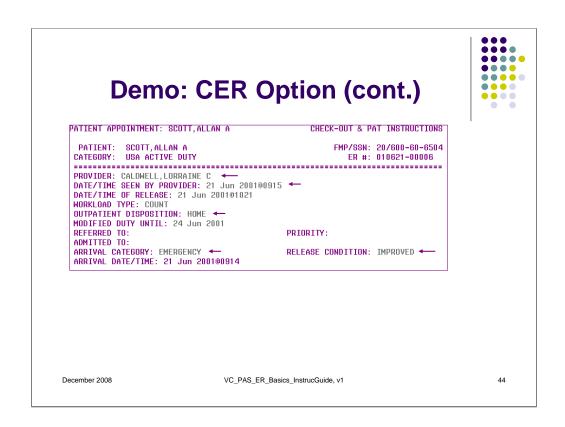
**Scenario:** Allan Scott has been treated in the ER for a hot water burn and is ready to be sent home to rest for three days. You must check this patient out of the ER and give him follow-up instructions.

Let's begin the demonstration.



Type **CER** at the 'Select Emergency Room Menu Option' prompt.

Type **S6504** (Scott,Allan) at the 'Select ER PATIENT NAME' prompt and confirm that Allan is the correct patient by pressing the **<Enter>** key.



#### **Instructor Notes:**

The text for this slide is continued on the next slide.

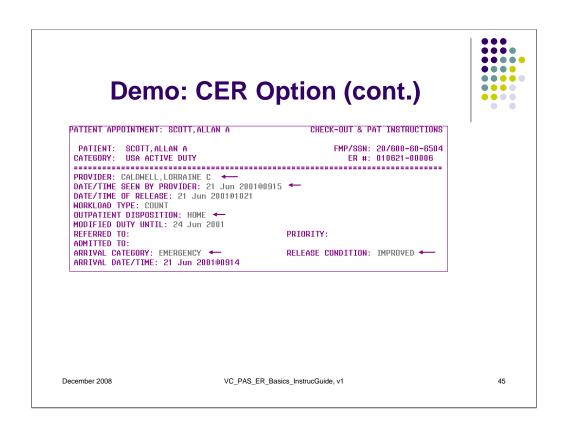
#### Text:

The CHECK-OUT & PAT INSTRUCTIONS screen displays.

The cursor is blinking in the 'PROVIDER' field. If Allan Scott's provider has a record populated in the Clinic Profile, the provider's name would display here. This field should not be left blank. It will cause the End-of-Day (EOD) report for this ER to be delinquent, and stat reports will not run.

Dr. Caldwell saw the patient. Type **CALD** at the 'PROVIDER' prompt, and then press the **<Enter>** key twice.

Type **T@0904** in the 'DATE/TIME SEEN BY PROVIDER' field. Make sure that the time in this field is after the patient's arrival time and before the current time.



#### **Instructor Notes:**

Continuation from previous slide.

#### Text:

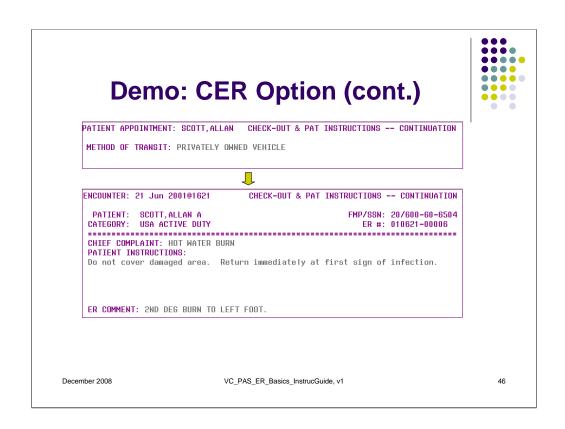
Press the **Enter**> key until you access the 'OUTPATIENT DISPOSITION' field, and then type **HOME**.

If the patient had been referred to a ward or clinic, you would enter that information in the 'REFERRED TO' field.

If the patient was referred to another location, the 'PRIORITY' field is used to indicate how soon this must happen.

You would enter the name of the ward in the 'ADMITTED TO' field if the patient was being admitted. Press the **<Enter>** key to access the 'MODIFIED DUTY UNTIL' field, and then type **T+3**.

Type **IMPROVED** in the 'RELEASE CONDITION' field.



The system skips the 'Arrival Date/Time' field and displays the method of transit. Press the **<Enter>** key.

Data in the 'CHIEF COMPLAINT' field was entered during patient check-in and can be edited here by typing over it; or you can press **Enter**> to accept the default. We'll accept the default.

In the 'PATIENT INSTRUCTIONS' field, type: **Do not cover damaged area. Return immediately at first sign of infection.** 

Press the **<Enter>** key to access the 'ER COMMENT' field, and then type: **2<sup>nd</sup> DEG BURN TO LEFT FOOT**.

Press the **Enter**> key to access the 'File/exit' action.

We will not print the SF558; so type **N** at the 'Print Encounter Form SF558 Work Sheet: YES//' prompt.

The Emergency Room Menu displays.

Let's test your knowledge with another question.

# Question



Multiple Choice:

If the \_\_\_\_\_ field is left blank, it will cause the EOD report for the ER to be delinquent, and stat reports will not run.

- A. Clinic
- B. Release Condition
- C. Provider
- D. None of the above

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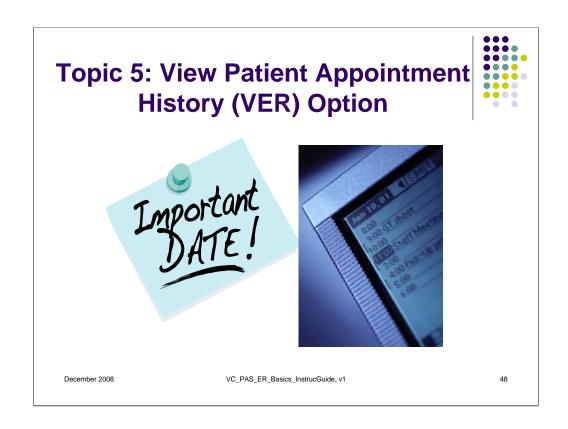
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#### Text:

The correct answer is  $\mathbf{C}$  – Provider. The 'PROVIDER' field should not be left blank. It will cause the EOD report for this ER to be delinquent, and stat reports will not run.

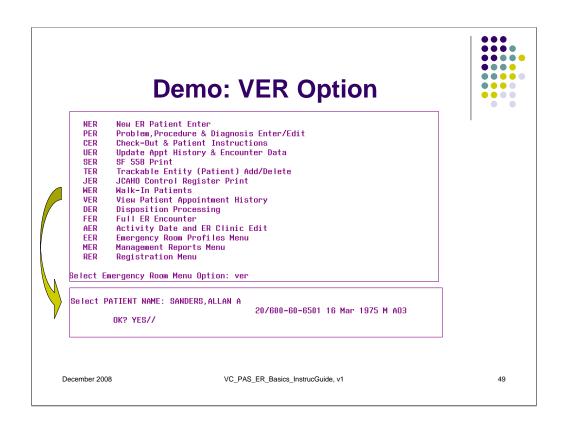
Topic discussed on slide 44.

Let's move on to Topic 5.



In Topic 5, we will demonstrate how to view a patient's appointment history. Sometimes, patients will not remember the name of their provider, or will request a list of future appointments. The View Patient Appointment History (VER) option is used to quickly look up a patient's past and future (pending) appointments and Wait List requests. After viewing the appointment history for the patient, you can also check appointment histories for other family members.

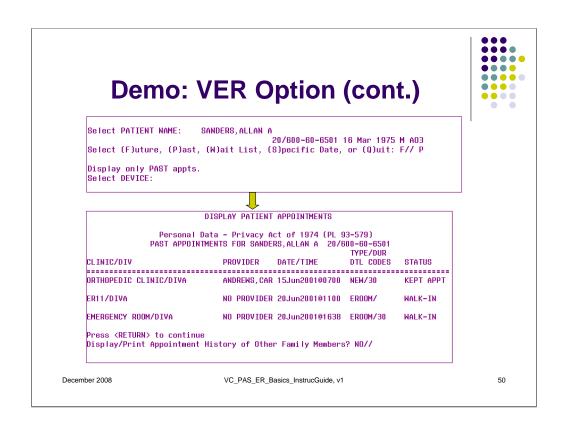
**Scenario:** A cardiac patient has arrived at the ER via ambulance and needs immediate attention. You discover that this patient has been seen previously at this facility and you need to see this patient's appointment history. Let's begin our demonstration.



Type **VER** at the 'Select Emergency Room Menu Option' prompt to access the View Patient Appointment History option.

Type **SANDERS,ALLAN** at the 'Select PATIENT NAME' prompt.

Press the **<Enter>** key to confirm that this is the correct patient.



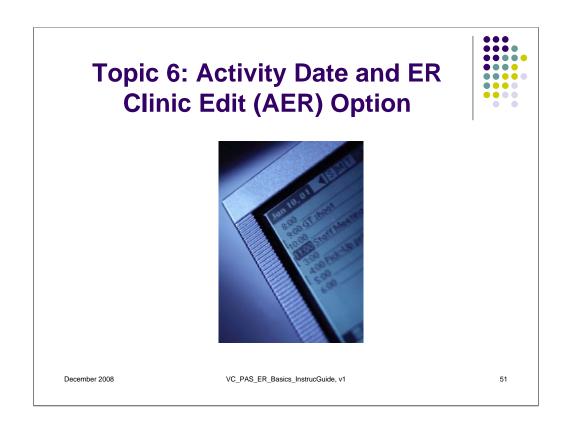
A prompt displays and allows you to choose (F)uture, (P)ast, (W)ait List, (S)pecific Date, or (Q)uit regarding the patient appointments.

Type **P** at the prompt to view the past appointments.

Press **Enter** at the 'Select DEVICE' prompt to display the data on the screen.

Press **<Enter>** to continue. We now have the opportunity to view other family members' appointments; however, we will accept the default of 'No' by pressing the **<Enter>** key.

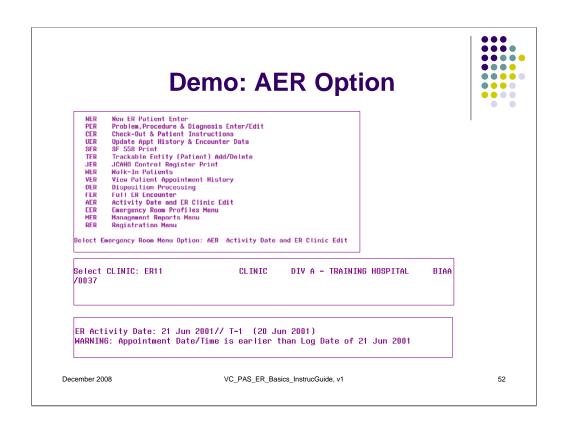
Let's move on to Topic 6.



In Topic 6, we will discuss the Activity Date and ER Clinic Edit (AER) option. This option allows you to change the clinic and/or activity date used while accessing options on the Emergency Room Menu during your current session.

We previously discussed the different ways of updating or editing a patient's information once it had been entered into CHCS using the UER option.

**Scenario:** In the CHCS training database, today is Jun 21, 2001. On the previous day, patient SANDERS,ALLAN was treated in the ER, then released. You have received supplemental information concerning this encounter that must be entered into the system. We need to change the ER activity date. Let's begin.



Type **AER** at the 'Select Emergency Room Menu Option' prompt to access the Activity Date and ER Clinic Edit option.

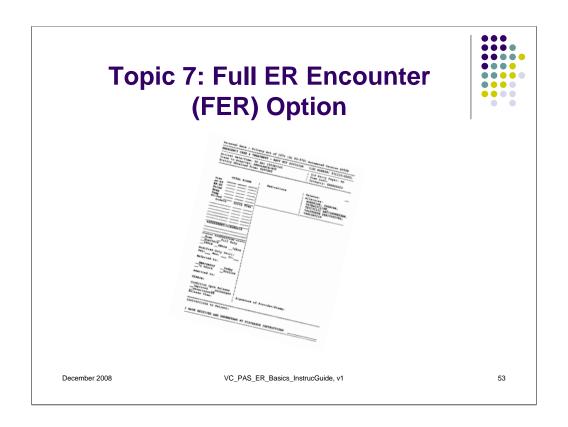
At the 'Select CLINIC' prompt, type ER11.

Type **T-1** at the 'ER Activity Date' prompt.

In the third box on the screen, note that the ER Activity Date has been changed to 20 Jun 2001.

A warning message briefly displays, informing you that the appointment date and time is earlier than the current Log Date. The system then returns you to the Emergency Room Menu.

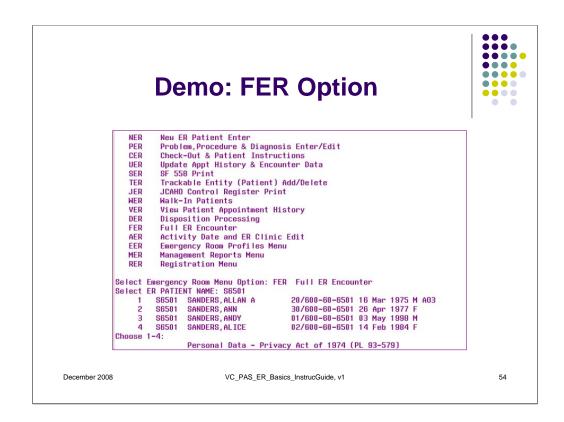
Let's move on to Topic 7.



In Topic 7, we will discuss the Full ER Encounter (FER) option.

Patient data often changes. Using the FER option allows you to enter or edit all encounter-related information. Being familiar with this option can save you a lot of time as you perform your tasks.

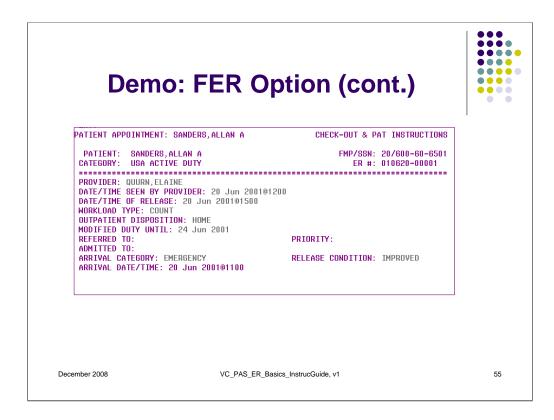
We will continue with the scenario that we have received additional information on our patient, Allan Sanders, who was seen yesterday. We have changed the activity date. Now, let's annotate the encounter.



Type **FER** at the 'Select Emergency Room Menu Option' prompt, and the 'Select ER PATIENT NAME' prompt displays.

Type **S6501** to display a list of patients that meet the criteria.

Type 1 at the 'Choose 1-4' prompt.



The CHECK-OUT & PAT INSTRUCTIONS screen displays. This is the same screen in which you entered data to check-out an individual patient.

We'll update the fields as follows:

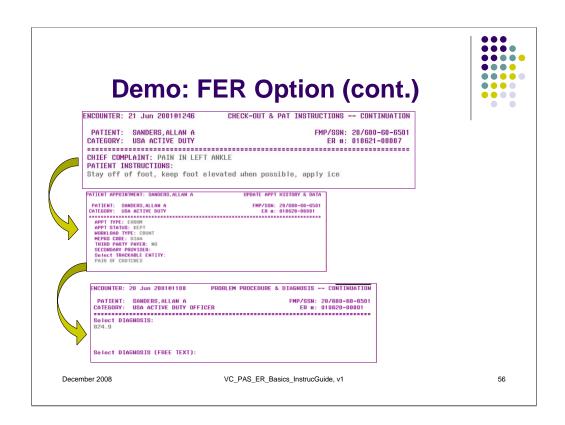
DATE/TIME SEEN BY PROVIDER: T-1@1200

DATE/TIME OF RELEASE: **T-1@1500**OUTPATIENT DISPOSITION: **HOME** 

MODIFIED DUTY UNTIL: T+3

ARRIVAL CATEGORY: **EMERGENCY**RELEASE CONDITION: **IMPROVED** 

ARRIVAL DATE/TIME: 20 Jun 2001@1100



Press the **<Enter>** key until you access the 'PATIENT INSTRUCTIONS' field, and then type **Stay off of foot, keep foot elevated when possible, apply ice**.

Press the **Enter**> key until you are prompted to print the SF588.

We will not print the SF558; therefore, type **N** at the 'Print Encounter Form SF558 Work Sheet: //YES' prompt.

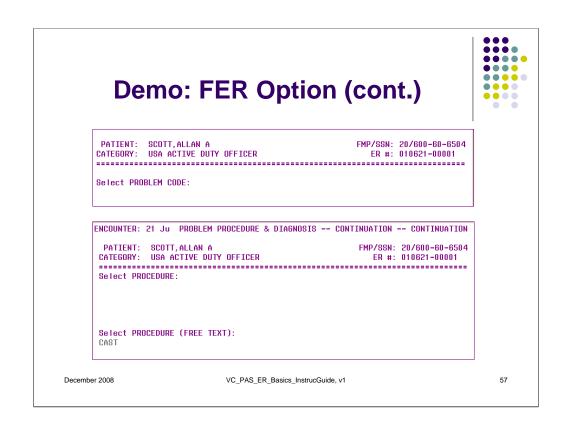
Continue to press the **<Enter>** key to the 'Select TRACKABLE ENTITY' field. Type **PAIR**, and then press the **<Enter>** key to add "PAIR OF CRUTCHES" as a trackable entity.

Continue to press the **Enter**> key until you accept the 'File/exit' action and the PROBLEM PROCEDURE & DIAGNOSIS -- CONTINUATION screen displays.

Type **824.9** as the diagnosis. You may have received this information from the attending provider, or you may ask the appropriate personnel for this data.

We will type **N** in the 'JOB RELATED' field.

Type **Broken Ankle** in the 'Select DIAGNOSIS (FREE TEXT)' field:



Since we do not want to enter a new problem code, press **Enter**> to exit the field.

You may enter a code for a procedure that was performed for this patient in the 'Select PROCEDURE' field.

Let's press the **<Enter>** key to access the 'Select PROCEDURE (FREE TEXT)' field, and then type **Cast**.

The next prompt is: 'Are you adding 'Cast' as a new PROCEDURE (FREE TEXT) (the 1<sup>st</sup> for this ENCOUNTER)?' Press the **<Enter>** key to confirm that you are adding it as a new procedure.

Press **<Enter>** until the Emergency Room Menu displays.

Now, it's time for another question.

# Question



#### Multiple choice:

Which menu option allows you to update all of the patient's encounter data?

A. PER – Problems, Procedures and Diagnosis

B. FER - Full ER Encounter

C. UER - Update, Appt History Encounter Data

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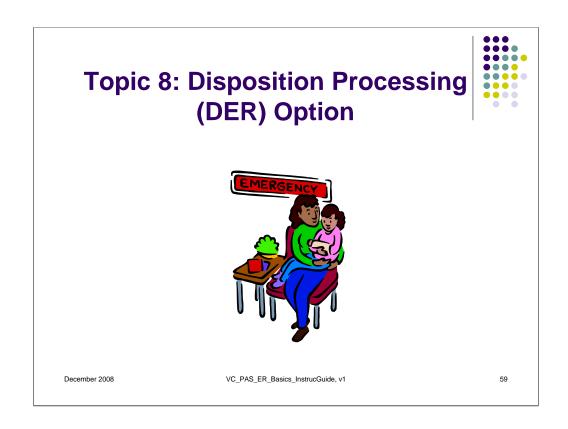
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#### Text:

The answer is **B** – Full ER Encounter. This option allows you to enter or edit data for parameters available in the Check-out & Patient Instructions, Update Appointment History & Encounter Data, and the Problem, Procedure & Diagnosis Enter/Edit options for an individual encounter.

Topic discussed on slide 53.

Let's move on to Topic 8.



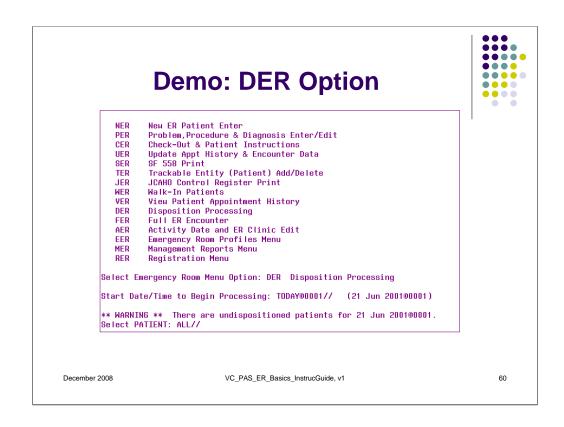
In Topic 8, we will discuss the Disposition Processing (DER) option. This option allows you to disposition (discharge) an individual patient, or all patients, from an emergency room on a specific date.

The steps for dispositioning all patients at once are similar to the steps you use to check-out patients individually except as follows:

- The system automatically calls up each patient for you, instead of you having to enter each patient's name one at a time.
- The system keys off an entry in the 'Outpatient Disposition' field. That is, if the 'Outpatient Disposition' field is not filled in, the system locates and presents the patient data display for disposition at this time.
- If the 'Outpatient Disposition' field is filled in, the system bypasses that patient.

**Scenario:** The ER personnel have checked in several patients who have been treated in the last several hours. No one has had an opportunity to disposition any of the patients until now. You must now disposition the patients.

Let's begin the demonstration.



Type **DER** at the 'Select Emergency Room Menu Option' prompt.

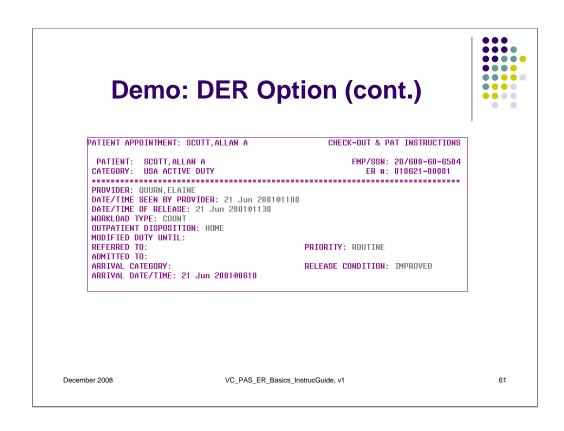
The start date in which to begin the process prompt displays. Press the **Enter**> key to accept the default date.

A warning message displays indicating that there are patients who have not been dispositioned prior to today's date.

The procedure of dispositioning all patients at once is generally something that occurs when patient workload and/or hospital staffing does not permit individually checking out each patient as he/she leaves the ER.

At the 'Select PATIENT' prompt, accept the default of ALL and press < **Enter**>.

The CHECK-OUT & PAT INSTRUCTIONS screen for SCOTT, ALLAN displays.



Press the **<Enter>** key twice to accept the default of Dr. Quurn as the provider.

We'll type **T@1100** as the date/time the patient was seen by the provider. Type **T@1130** as the time he was released.

Press the **<Enter>** key to access the 'OUTPATIENT DISPOSITION' field and type **Home**. Confirm your entry by pressing the **<Enter>** key. A response must be entered in this field, otherwise, the patient is not recorded as dispositioned from the ER.

Type **R** in the 'PRIORITY' field to display ROUTINE.

Press the **Enter** key to access the 'RELEASE CONDITION' field and type **I**, for "IMPROVED."

Continue to press the **<Enter>** key until you have filed the changes to Allan Scott's encounter.

The next patient's name displays.

[Instructor Note: Have the students assist you to complete the disposition process for the remaining patients.]

Let's continue to Topic 9.

# Topic 9: Walk-in Patients (WER) Option





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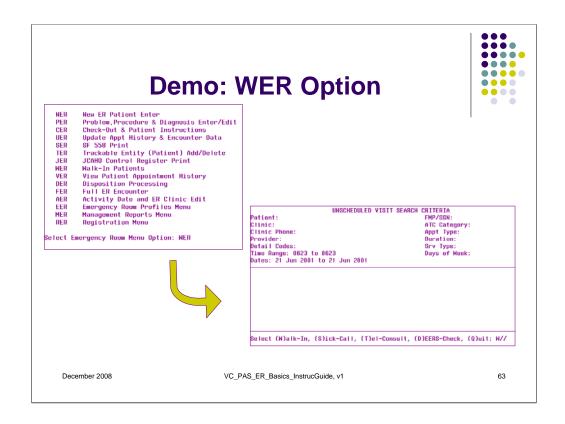
#### Text:

In Topic 9, we will discuss "walking in" an emergency room patient in a clinic other than the Emergency Room. This allows the specialist who sees the patient in the Emergency Room to receive the workload credit in the appropriate clinic.

When you select this option, the system accesses the Unscheduled Visit option on the Clerk Scheduling Menu. You can then enter appointment information for patients who do not have scheduled appointments.

For unscheduled appointments, the system automatically sets the appointment status to Walk-In, T-Con, or Sick-Call, respectively, and sets the appointment time to the current time and the appointment date to the current date. You may also initiate an online DEERS check for any patient and print or delete appointment orders and/or Wait List requests (if any).

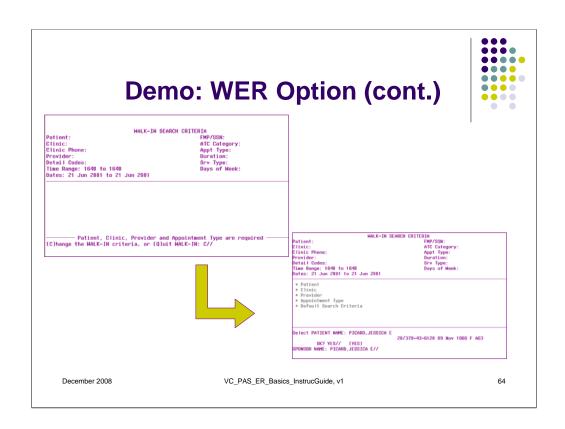
**Scenario:** Your patient is in the ER after a cardiac arrest. Dr. Callahan, the cardiologist, was called to offer his expertise. "Walk" the patient into the Cardiology Clinic.



Type **WER** at the 'Select Emergency Room Menu Option' prompt. The UNSCHEDULED VISIT SEARCH CRITERIA screen displays.

At the beginning of the day, all fields displayed on the screen are blank except for the time range and dates (the current time and date). The last clinic and provider entered will display after the first use of the Unscheduled Visit (USV) option (or the Walk-In Patients option on the Emergency Room Menu).

Press < Enter > to accept the default of Walk-In.



The WALK-IN SEARCH CRITERIA screen displays.

The 'Patient', 'Clinic', 'Provider', and 'Appointment Type' fields are required.

Press the **Enter**> key to accept the default of 'C' to change the walk-in criteria. A list of selection criteria displays.

Press <**F11**> to select all, and then press the <**Enter**> key.

Type **PICARD,J** at the 'Select PATIENT NAME' prompt, and then press **Enter**> three times to confirm that this is the correct patient.

Type **X** to exit the NEW DEERS INTERACTIVE REQUEST – WAIT screen.

Type **X** once more to exit the NEW DEERS INTERACTIVE REQUEST - TIMEOUT screen. The DEMOGRAPHICS DISPLAY screen displays.

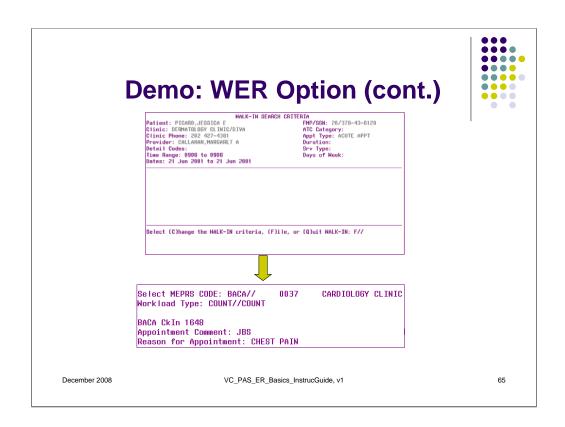
Press **Enter** to accept the default and return to the WALK-IN SEARCH CRITERIA screen.

Type **CARDIO** at the 'Select CLINIC' prompt.

Type 1 at the 'Choose 1-2' prompt.

Type **CALLAHAN** at the 'Select PROVIDER' prompt, and then press **Enter**> twice to confirm the selection.

Type **A** at the 'Select APPT TYPE' prompt, for the" Acute" appointment type.



Notice that the fields at the top of the WALK-IN SEARCH CRITERIA screen are populated.

Press the **<Enter>** key to save the current criteria selections to be saved as your default selection criteria.

Press the **Enter**> key until the 'Appointment Comment' field displays, and then type your initials.

At the 'Reason for Appointment prompt', type **Chest Pain**.

Press **Enter** until the WALK-IN SEARCH CRITERIA screen redisplays.

Type **Q** at the selection prompt to exit the screen and return to the UNSCHEDULED VISIT SEARCH CRITERIA screen.

Type **Q** to return to the Emergency Room Menu.

Let's test your knowledge with another question.

# **Question**



Multiple Choice:

You would use the WER option to walk in a patient so that the \_\_\_\_\_ will receive workload credit in the appropriate clinic.

- A. ER Physician
- B. Specialist
- C. None of the above

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#### Text:

The answer is **B** - Specialist. The WER option allows you to walk in a patient to a clinic other than the Emergency Room so that the specialist, who sees the patient in the Emergency Room, receives the workload credit in the appropriate clinic.

Topic discussed on slide 62.

Now, let's move to the next slide and begin our discussion of Lesson 3.

# Lesson 3: Printing Forms and Reports



Topic 1: Print the SF558

Topic 2: Joint Commission on the Accreditation of

Healthcare Organizations (JCAHO)

**Control Register** 

**Topic 3: Management Reports** 

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#### **Instructor Notes:**

Log into the CHCS training database (FWVBB):

Access Code: JABBER Verify Code: WOCKY

Menu Path: CA > PAS > EM

#### Text:

In Lesson 3, we will discuss the steps used to print the Standard Form 558 and selected reports. These are the topics that we will cover in Lesson 3. [Read the topics].

Now, let's go over the objective for this lesson.

# **Lesson 3 Objective**



Print a Standard Form 558 (SF558) and selected reports that relate to patient encounters and ER workload.

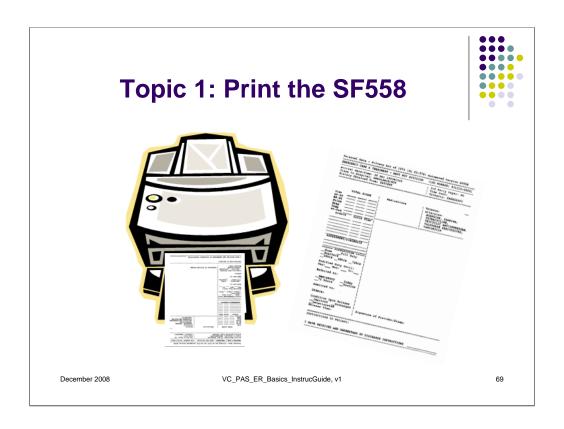
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#### Text:

By the end of this lesson, you will be able to [read the objective]. Let's begin with Topic 1.



#### **Instructor Notes:**

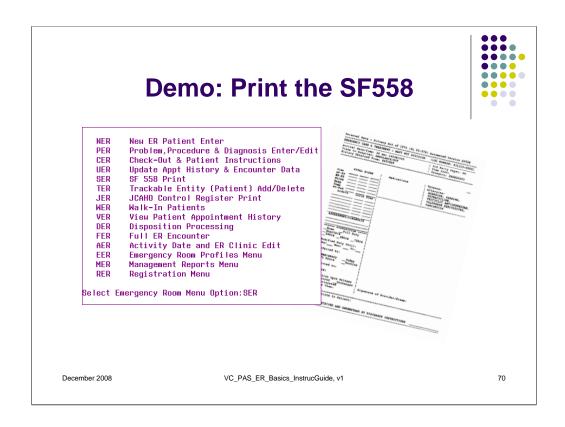
Remember to press <Enter> after each entry you make in CHCS, as listed in the instructions in the text.

#### Text:

In Topic 1, we will demonstrate the steps used to re-print the Standard Form 558 (SF558). This document is also known as an "Encounter" form.

**Scenario:** The printer jammed when you were printing the encounter form so you must print another one.

Let's begin the demonstration.

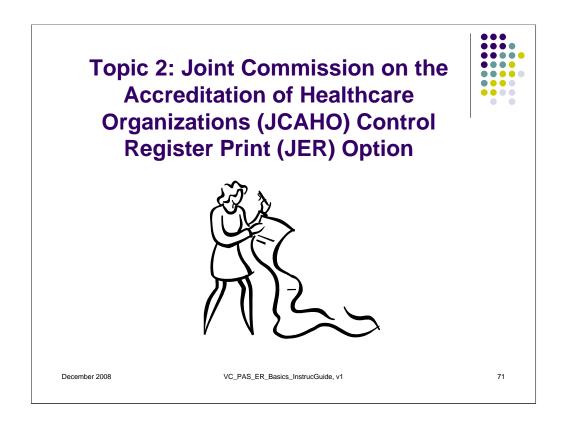


Type **SER** at the 'Select Emergency Room Menu Option' prompt.

Type **SCOTT,ALLAN** at the 'Select ER PATIENT NAME' prompt and confirm that this is the correct patient by pressing the **<Enter>** key.

At the 'DEVICE' prompt, you may type a double question mark to obtain a list of printer names. Enter the name of the printer or press <Enter> to accept the default printer, if one has been established in the clinic profile. We will type **Home** to display the data on the screen.

To view the SF558, use the vertical scroll bar to scroll backwards. Let's move on to Topic 2.



In Topic 2, we will use the JER option to demonstrate printing the Joint Commission on the Accreditation of Healthcare Organizations (JCAHO) report.

This option allows you to print the JCAHO Control Register by clinic, division, group, or facility for a specified date/time range. This report provides you with a list of all patients who arrived in the ER during a specified time period.

Let's look at the scenario for this topic on the next slide.

# **Demo: JER Option**



Scenario:

Your supervisor has requested that you generate today's JCAHO Control Register for the ER.



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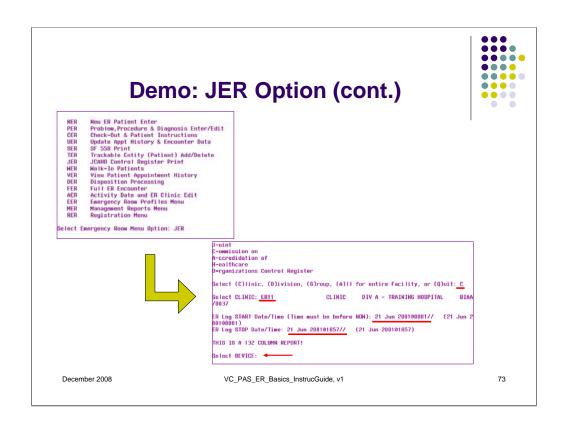
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#### Text:

[Read the slide.]

Let's return to the application share to begin the demonstration.



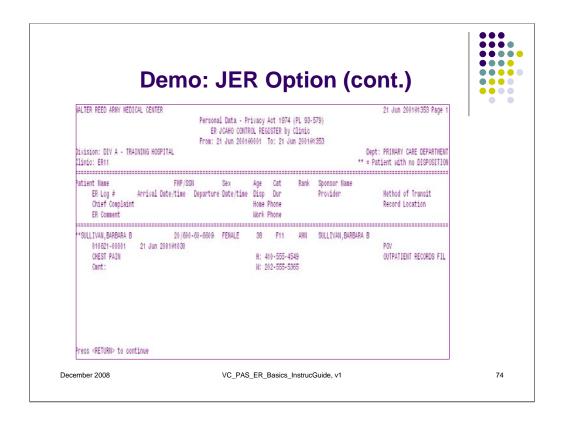
Type **JER** at the 'Select Emergency Room Menu Option' prompt.

Type **C** at the next prompt to run the report by clinic.

Type **ER11** at the 'Select CLINIC' prompt.

Press the **Enter**> key twice to accept the default of today's date as the start and stop date/time.

At the 'Select DEVICE' prompt, press the **Enter**> key to display the report on the screen.



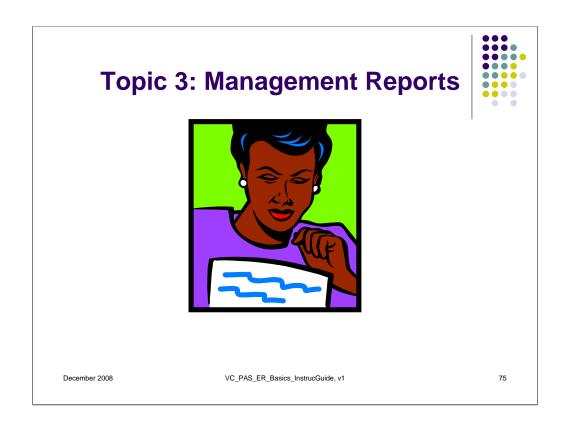
## **Instructor Notes:**

Describe the report and point to the various items as you describe them. After describing the report, press the <Enter> key to return to the Emergency Room Menu.

#### Text:

This is an example of the JCAHO Control Register [describe components of the report].

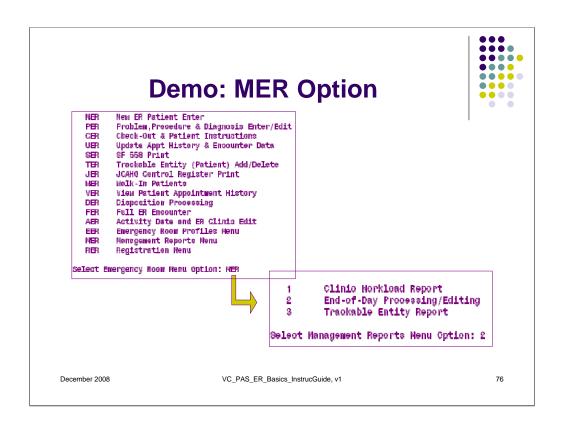
We're ready to move on to Topic 3, so let's press the **Enter** key to return to the Emergency Room Menu.



In Topic 3, we will discuss the following options, which are found on the Management Reports Menu (MER):

- Clinic Workload
- End-of-Day Processing/Editing
- Trackable Entity

Let's begin.



## **Instructor Notes:**

Remember to press the <Enter> key after each data entry.

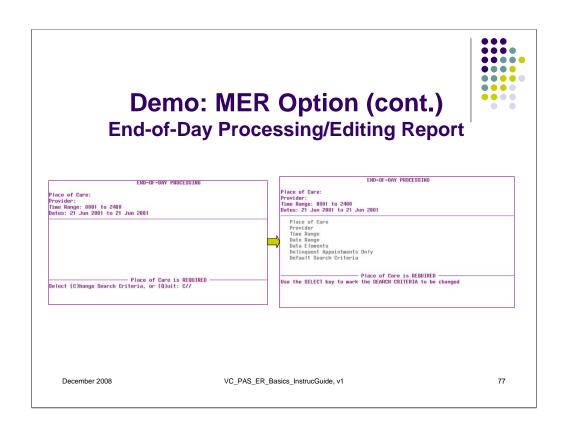
## Text:

Type **MER** at the 'Select Emergency Room Menu Option' prompt. The list of the report options displays.

In order to generate an accurate Clinic Workload Report, all End-of-Day processing and editing must be completed. Therefore, we will begin with the End-of-Day Processing/Editing report. This report allows you to edit, modify, and update appointment history data, including the status of patient appointments.

A past date can be selected to enter/edit appointment history data; however, CHCS does not allow you to enter a date range more than seven days past the appointment, unless you are assigned the appropriate security key.

Type **2** at the 'Select Management Reports Menu Option' prompt.



The END-OF-DAY PROCESSING screen displays.

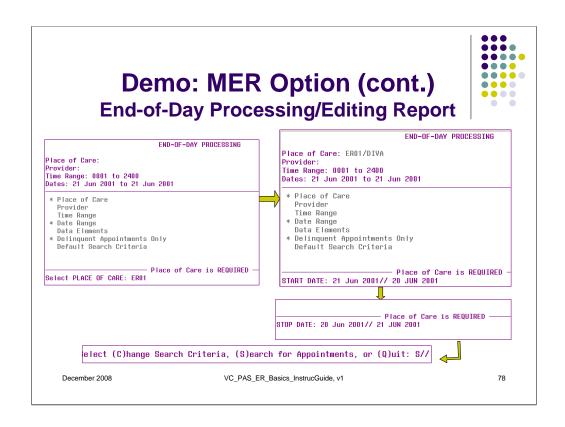
'Place of Care' is a required field. Press the **<Enter>** key to accept the default of 'C' to change the search criteria.

The data elements display, as shown in the caption on the right. We will select three criteria.

Press the **<End>** key to select 'Place of Care', then use the down arrow key to place the cursor next to 'Date Range' and press the **<End>** key. Now place your cursor next to 'Delinquent Appointments Only' and select it.

Selecting the Delinquent Appointments data element allows you to list only those appointments that either have a "Pending" status or are missing names of the providers.

Press the **Enter** key and the 'Select PLACE OF CARE' prompt displays.

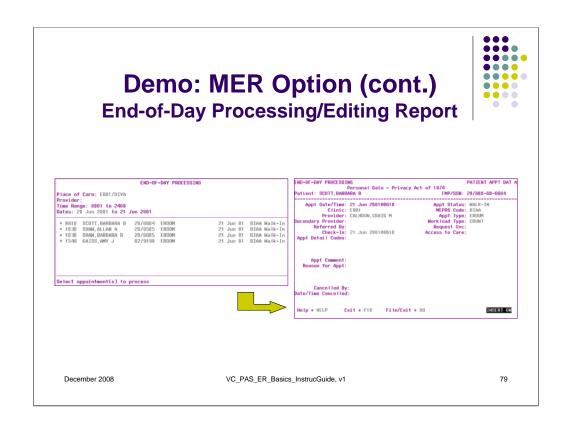


At the 'Select PLACE OF CARE' prompt, type ER01.

Notice that the 'Place of Care' field in the right screen capture is now populated with ER01.

At the 'START DATE' prompt, type **20 Jun 2001** and at the 'STOP DATE' prompt, type **21 Jun 2001**.

Press the **<Enter>** key to accept the default of 'S' to search for appointments.



Press the **<F11>** key to select all appointments displayed.

Press the **<Enter>** key to display the first PATIENT APPT DATA screen for the selected patient's appointment. This screen allows you to modify the appointment data.

Press the <Enter> key until you access the 'Provider' field, and type CALHOUN.

Press the <Enter> key until you access the 'Check-In' field, and type T-1 @ 0600.

You may complete the other fields, although they are not required.

Now, continue to press the **<Enter>** key until you access the 'File/exit' action. Press **<Enter>** to accept this action, which saves the information entered on the PATIENT APPT DATA screen.

This visit is not related to an injury; therefore, press the **<Enter>** key to accept the default of "No."

Update the Outpatient Disposition data according to site procedures. We will press the **Enter**> key to accept the 'File/exit' action. The next patient's record displays.

[Instructor Note: As an interactive component, have the student's guide you through completing the EOD entries for the remaining patients by entering a provider's name for each. Make sure that the 'Check-In' date is earlier then the appointment date.]

Demo: MER Option (cont.) End-of-Day Processing/Editing Report	
END-OF-DAY PROCESSING Place of Care: ER01/DIVA Provider: Time Range: 0001 to 2400 Dates: 20 Jun 2001 to 21 Jun 2001	
Select (C)hange Search Criteria, (S)earch for Appointments,  (P)rint EOD Reports, or (Q)uit: P//	
Select (E)nd-of-Day Processing Report, or (Q)uit: E//	
nter DEVICE: spool VMS file elect SPOOL DOCUMENT NAME: JBS JUN 2001 Are you adding 'JBS JUN 2001' as a กеม SPOOL DOCUMENT? Y	
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**Text:** Once you have completed the End-of-Day entries, you are prompted to print the EOD reports.

Press the **Enter**> key to accept the default of 'E' to print the End of Day Processing Report.

At the 'Enter DEVICE' prompt, type **spool**. If you do not have the 'SPOOL' menu option or know how to spool a document, contact your System Specialist.

Type **JBS JUN 2001** at the 'Select SPOOL DOCUMENT NAME' prompt.

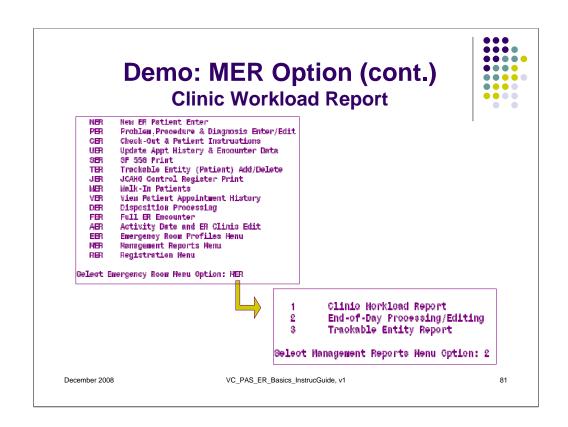
<u>Tip</u>: To make the report easy to find, include your initials at the beginning of the report name. Note that I added my initials, JBS, to the name of the report.

Type **Y** at the prompt: 'Are you adding 'JBS JUN 2 2001' as a new SPOOL DOCUMENT?'

The system will default the expiration date at seven days; however, you may change the date. We will accept the default date by pressing the **<Enter>** key.

Type **Q**, to quit, until you are returned to the 'Select Management Reports Menu Option' prompt.

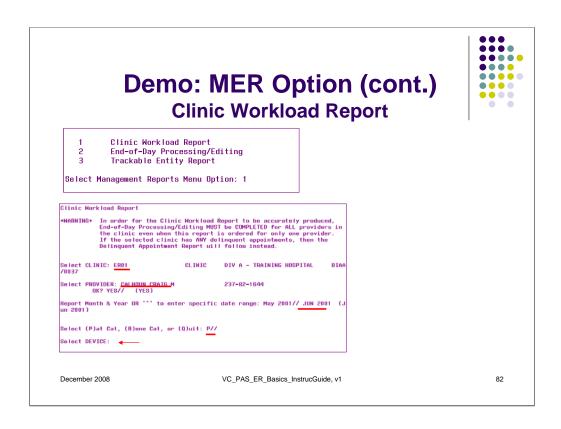
We will discuss the Clinic Workload Report next.



The Clinic Workload Report allows you to display/print clinic workload data and visit summary report. This report is an on-demand, single clinic and single-provider or multiple-provider statistical report, which is normally run monthly.

When you select the Clinic Workload Report option and specify a clinic, if there are pending appointments and/or appointments without the provider's name, CHCS will automatically generate the Delinquent End-of-Month Processing Report instead of the Clinic Workload Report. Once the Delinquent End-of-Month Processing has been done, the Clinic Workload Report can be re-selected and printed.

Let's begin our demonstration.



At the 'Select Management Reports Menu Option' prompt, type 1 to access the Clinic Workload Report option.

A warning message is displayed informing you that the EOD Processing/Editing MUST be completed in order for the workload report to be accurately produced.

Type **ER01** at the 'Select CLINIC' prompt.

Type **CALHOUN** at the 'Select PROVIDER' prompt and press the **<Enter>** key twice to confirm that this is the correct provider.

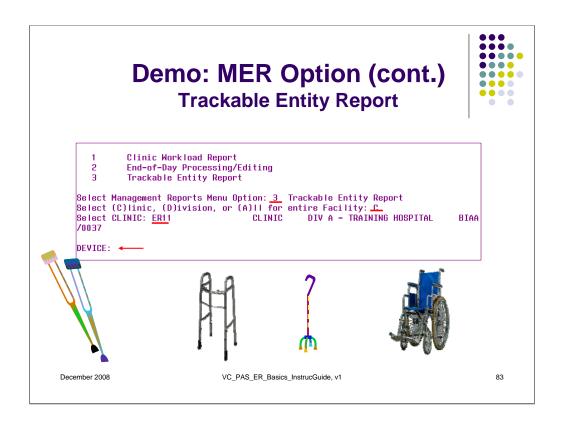
Type **June 2001** at the prompt: 'Report Month & Year OR '^' to enter specific date range: May 2001//'

Press the **<Enter>** key to accept the default of 'P' (for Patient Category).

At the 'Select DEVICE' prompt, press the **<Enter>** key to display the report.

We will continue to press the **<Enter>** key to display the remainder of the Clinic Workload Report.

Next, we will discuss the Trackable Entity Report.



The Trackable Entity Report option allows you to generate and print a report that lists trackable items that were borrowed from the ER (e.g., canes, crutches).

Type 3 at the 'Select Management Reports Menu Option' prompt.

You can print the report for an individual Clinic or Division, or you can select "All" to generate a report for the entire facility.

Type **C** at the select prompt to generate a report for a specific clinic.

Type **ER11** at the 'Select CLINIC' prompt, and then press the **<Enter>** key twice to display the data on the screen.

## **Demo: MER Option (cont.) Trackable Entity Report** WALTER REED ARMY MEDICAL CENTER 21 Jun 2001@1202 Page 1 Personal Data - Privacy Act of 1974 (PL 93-579) TRACKABLE ENTITY REPORT Thru: 21 Jun 2001 Dept: PRIMARY CARE DEPARTMENT Clinic: ER11 DATE PATIENT NAME FMP/88N ER LOG # HOME PHONE **WORK PHONE** TRACKABLE ENTITY: PAIR OF CRUTCHES CLINIC: ER11 21 Jun 2001@0610 010621-00001 SCOTT, ALLAN A 20/600-60-6504 202-555-9125 918-555-4001 December 2008 VC\_PAS\_ER\_Basics\_InstrucGuide, v1

## Text:

The Trackable Entity Report displays the following data for every trackable entity loaned from a clinic:

- Trackable entity name
- Loaning clinic
- Date borrowed
- ER log #
- Patient's name and telephone numbers (home and work)
- FMP/SSN

Press the **<Enter>** key until the Management Report menu displays.

Now, let's test your knowledge with another question.

## Question



In order for an accurate Clinic Workload Report to be produced, the following must first be completed:

- A. End-of-Day processing
- B. A summary of all items loaned to patients
- c. All of the above

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## Text:

The answer is **A**. In order to generate an accurate Clinic Workload Report, End-of-Day processing must be complete.

Topic discussed on slide 76.

Now, let's summarize what was presented in this class.

# **Course Summary**



In this course, we discussed how to:

- maintain the profiles that have been created for emergency room clinics and providers
- accurately document patients ER visits from check-in to check-out
- print a Standard Form 558 (SF558), the JCAHO Control Register and other selected reports that relate to patient encounters and ER workload

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## Text:

This is a summary of the information that we covered. [Read the slide.] Next, we will review the reference material for this course.

## References



The following document was used as a reference for this course:

SAIC/CHCS Doc. TC-4.5-0337 PAS: Emergency Room Processing Presenter's Guide, 29 Jul 1996

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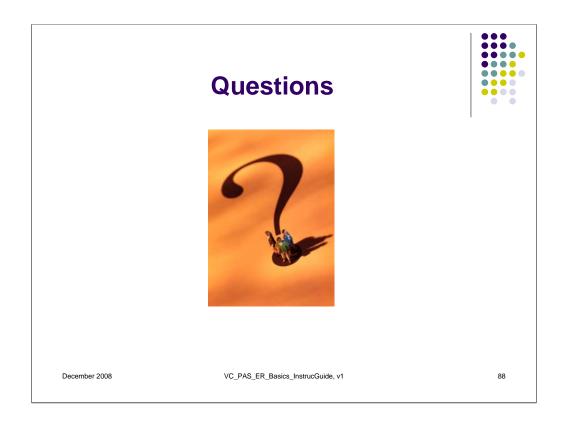
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## Text:

The content for this course is based on the reference document you see listed here.

We can also provide the Student Guide for this course, if you have not already received it. It is in a PowerPoint format and is essentially a copy of the course content that was presented today. Be sure to print it with the notes, not just the slides.

Now, I'd like to take any questions you may have before concluding the class.



## **Instructor Notes:**

Ask students for any final questions before ending the class.

## Text:

Are there any questions?

Thank you for your attention throughout this course.